

File 65:Inside Conferences 1993-2003/May W1
File 35:Dissertation Abs Online 1861-2003/Apr
File 583:Gale Group Globalbase(TM) 1986-2002/Dec 13
File 2:INSPEC 1969-2003/May W1
File 233:Internet & Personal Comp. Abs. 1981-2003/Apr
File 474:New York Times Abs 1969-2003/May 13
File 475:Wall Street Journal Abs 1973-2003/May 13
File 99:Wilson Appl. Sci & Tech Abs 1983-2003/Mar
File 256:SoftBase:Reviews,Companies&Prods. 82-2003/Apr
File 169:Insurance Periodicals 1984-1999/Nov 15
File 139:EconLit 1969-2003/May

Set	Items	Description
S1	56274	FINANCIAL()SERVICE? ?
S2	138078	WEALTH? ? OR RICH OR NET()WORTH
S3	982887	INDIVIDUAL? ? OR PERSON? ? OR PEOPLE OR CLIENT????
S4	1339168	FREQUEN? OR TIMES
S5	1114719	REFERRAL? ? OR REFER? ? OR REFERR??? OR USE UR UTILIS? OR - UTILIZ? OR NEED OR NEEDS OR CONTACT?
S6	2236188	VALUE? ? OR VALUING OR RATE?? OR RATING? ? OR VALUATION? ?
S7	306861	HIERARCH? OR RANK OR RANKS OR RANKED OR RANKING? ? OR GRAD- E? ? OR GRADING
S8	359236	MARKETING
S9	49	S2(2N)S3(S)S1
S10	9113	S4(3N)S5
S11	0	S9 AND S10
S12	4	S9 AND S5
S13	0	S9 AND S7
S14	4	S9 AND S6
S15	8	S12:S14
S16	8	RD (unique items)
S17	2	S16/2001:2003
S18	6	S16 NOT S17
S19	1460	S8/TI,DE AND S1/TI,DE
S20	9	S2/TI,DE AND S19
S21	9	S20 NOT S15
S22	8	RD (unique items)
S23	1	S22/2001:2003
S24	7	S22 NOT S23
S25	508	S1 AND S2
S26	81	S25 AND (S10 OR S6 OR S7)
S27	0	S25 AND S10
S28	4	S25 AND S4(S)S5
S29	10	S25 AND S7
S30	12	S28:S29 NOT (S15 OR S24)
S31	12	RD (unique items)
S32	1	S31/2001:2003
S33	11	S31 NOT S32
S34	11	Sort S33/ALL/PY,D [not relevant]
S35	1181	S1/DE AND MARKETING/DE
S36	112	S2/DE AND INDIVIDUAL? ?/DE
S37	0	S35 AND S36
S38	11282	S2/DE
S39	0	S35 AND S38
S40	37755	INDIVIDUAL?/DE
S41	0	S35 AND S340
S42	0	S35 AND S40

File 350:Derwent WPIX 1963-2003/UD,UM &UP=200330

File 347:JAPIO Oct 1976-2003/Jan(Updated 030506)

File 371:French Patents 1961-2002/BOPI 200209

Set	Items	Description
S1	457	FINANCIAL()SERVICE? ?
S2	41287	WEALTH? ? OR RICH OR NET()WORTH
S3	479309	INDIVIDUAL? ? OR PERSON? ? OR PEOPLE OR CUSTOMER? ? OR CLI- ENT????
S4	1094993	FREQUEN? OR TIMES
S5	61755	REFERRAL? ? OR REFER? ? OR REFERRED OR REFERRING
S6	7382958	USE OR UTILIS? OR UTILIZ?.OR NEED OR NEEDS OR CONTACT?
S7	1800707	VALUE? ? OR VALUING OR RATE? ? OR RATING? ? OR VALUATION? ?
S8	85438	HIERARCH? OR RANK OR RANKS OR RANKED OR RANKING? ? OR GRAD- E? ? OR GRADING
S9	238558	SERVICE OR SERVICES
S10	4405	MARKETING
S11	215998	IC=G06F-017
S12	41275	WEALTH? ? OR RICH OR HIGH()NET()WORTH
S13	3	(PRIVATE OR PERSONALIZED OR PERSONALISED)()BANKING
S14	3	(S1 OR S13) AND S12
S15	3	S14 AND S11
S16	460	S1 OR S13
S17	57331	S4(3N)S6:S7
S18	4	S16 AND S17
S19	3	S18 NOT S15
S20	11	S16 AND S8
S21	10	S20 NOT (S15 OR S18)
S22	8	S11 AND S21
S23	2	S21 NOT S22

15/26,TI/2 (Item 2 from file: 350)

DIALOG(R)File 350:Derwent WPIX

(c) 2003 Thomson Derwent. All rts. reserv.

013905138

WPI Acc No: 2001-389351/200141

Market information management terminal has contact management interface
displaying contact records with contact ID information and market
information interface displaying searched and extracted information items

19/26,TI/3 (Item 3 from file: 350)

DIALOG(R)File 350:Derwent WPIX

(c) 2003 Thomson Derwent. All rts. reserv.

012614958

WPI Acc No: 1999-421062/199936

Database event analysis and strategy selection method for managing
customer contacts

19/34/2 (Item 2 from file: 350)

DIALOG(R)File 350:Derwent WPIX

(c) 2003 Thomson Derwent. All rts. reserv.

013507061 **Image available**

WPI Acc No: 2000-679005/200066

Integrated financial product presentation method involves diarising needs
of customer, so as to contact customer prior to or at approximate times
regarding determined needs

Patent Assignee: FORD & CO PTY LTD T J (FORD-N)

File 350:Derwent WPIX 1963-2003/UD,UM &UP=200330
File 347:JAPIO Oct 1976-2003/Jan(Updated 030506)
File 371:French Patents 1961-2002/BOPI 200209

Set	Items	Description
S1	6	AU='COMISKEY S W'
S2	2	AU='MEYERS T H'
S3	1	S1 AND S2
S4	11898	FINANC?
S5	1	S1:S2 AND S4
S6	0	S5 NOT S3

3/34/1 (Item 1 from file: 350)

DIALOG(R)File 350:Derwent WPIX

(c) 2003 Thomson Derwent. All rts. reserv.

014098113 **Image available**

WPI Acc No: 2001-582327/200165

Financial service provision method for wealthy individuals involves core service providers affiliated service providers and non-affiliated service providers

Patent Assignee: COMISKEY S W (COMI-I)

Inventor: COMISKEY S W ; MEYERS T H

Number of Countries: 094 Number of Patents: 003

Patent Family:

Patent No	Kind	Date	Applicat No	Kind	Date	Week
WO 200167287	A1	20010913	WO 2001US7035	A	20010306	200165 B
AU 200141992	A	20010917	AU 200141992	A	20010306	200204
EP 1269343	A1	20030102	EP 2001913314	A	20010306	200310
			WO 2001US7035	A	20010306	

Priority Applications (No Type Date): US 2000520763 A 20000308

Patent Details:

Patent No	Kind	Lan	Pg	Main IPC	Filing Notes
-----------	------	-----	----	----------	--------------

WO 200167287	A1	E	20	G06F-017/00	
--------------	----	---	----	-------------	--

Designated States (National): AE AG AL AM AT AU AZ BA BB BG BR BY BZ CA
CH CN CR CU CZ DE DK DM DZ EE ES FI GB GD GE GH GM HR HU ID IL IN IS JP
KE KG KP KR KZ LC LK LR LS LT LU LV MA MD MG MK MN MW MX MZ NO NZ PL PT
RO RU SD SE SG SI SK SL TJ TM TR TT TZ UA UG UZ VN YU ZA ZW

Designated States (Regional): AT BE CH CY DE DK EA ES FI FR GB GH GM GR
IE IT KE LS LU MC MW MZ NL OA PT SD SE SL SZ TR TZ UG ZW

AU 200141992	A		G06F-017/00	Based on patent WO 200167287
--------------	---	--	-------------	------------------------------

EP 1269343	A1	E	G06F-017/00	Based on patent WO 200167287
------------	----	---	-------------	------------------------------

Designated States (Regional): AL AT BE CH CY DE DK ES FI FR GB GR IE IT
LI LT LU LV MC MK NL PT RO SE SI TR

Abstract (Basic): WO 200167287 A1

NOVELTY - Client's needs assessed from information received from client. Services required provided by hierarchical groupings of service providers. High value (110) frequently needed (100) services are core group (120). Low value seldom required services are non affiliated group (140). The others in between are affiliated group (130).

DETAILED DESCRIPTION - An INDEPENDENT CLAIM is included for a computer system implementing the described method.

USE - As a method of providing services (claimed) e.g. financial services, to wealthy individuals.

ADVANTAGE - Provides an efficient method of service provision since it affords highest degree of control over most valuable and frequently used services but places no restriction on the type of services that can be offered.

Searcher: Jeanne Horrigan
Serial 09/520763
May 15, 2003

74

DESCRIPTION OF DRAWING(S) - Drawing is a table illustrating a method of assigning service providers to service provider groups.

Frequent need (100)

High value (110)

Core group (120)

Affiliated group (130)

Non-affiliated group (140)

pp; 20 DwgNo 1/5

Derwent Class: T01

International Patent Class (Main): G06F-017/00

Searcher: Jeanne Horrigan
Serial 09/520763
May 15, 2003

75

File 348:EUROPEAN PATENTS 1978-2003/Apr W04
File 349:PCT FULLTEXT 1979-2002/UB=20030508,UT=20030501

Set	Items	Description
S1	6	AU='COMISKEY STEPHEN W'
S2	2	AU='MEYERS TIMOTHY H'
S3	2	S1 AND S2 [duplicates]
S4	4	S1:S2 NOT S3
S5	0	FINANC? AND S4

File 717:The Washington Times Jun 1989-2003/May 12

File 577:Roanoke Times 1992-2003/May 12

File 709:Richmond Times-Disp. 1989-2003/May 11

File 741:(Norfolk)Led./Pil. 1990-2003/May 11

File 635:Business Dateline(R) 1985-2003/May 13

Set	Items	Description
S1	624	COMISKEY
S2	7544	MEYERS
S3	3	S1 AND S2
S4	3	RD (unique items) [not relevant]